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Note for Neidle, Bruce

From: Neidle, Bruce

Date: Fri, Aug 9, 1996 4:39 PM

Subject: Nielsen C-Store w/e 8/3/96

To: Anise, Roy; Beran, Dave; Fuller, Stuart; Johnson, Craig; Keane, Denise; LeVan, Suzanne; Levy, Carolyn; Lund, Nancy; Mahan, Michael; Mikulay, Robert; Morgan, Jim; Mortensen, Jim; Nelson, Jack; Paoli, Pete; Schuyler, Brian; Steele, Harry; Szymanczyk, Mike; Wexler, Larry

File(s): Prelim Conv Memo 8-3-96 Exec; Prelim CS 800 Promo w/e 8/3/96; Prelim CS 800 Share w/e 8/3/96

Enclosed please find the Preliminary C-store report for w/e 8/3/96.

PM's share declined -0.1 point versus week-ago to 50.4%, with Basic accounting for the majority of the loss. After realizing strong gains during the MUBSS period, Basic's share declined -0.4 points during the past two weeks as the franchise's free product and money-off deals approached their lowest levels year-to-date. Marlboro's share increased slightly this week (+0.1 point) to 35.9%. This represents an unexpectedly strong week for Marlboro given its relatively limited promotional schedule. Among the major competitive premium brands, Newport and Kool incurred the largest weekly share losses, declining -0.1 point each, while Camel posted the largest share gain (+0.1 point) to 6.0% (matching its highest level YTD). Ahead of next week's "first week of the month," the Discount category fell -0.1 point to 26.5%, with slight gains for Doral and Misty more than offset by declines for Basic and Liggett PL.

- PM's share declined -0.1 point this week to 50.4%, with Marlboro's slight gain more than offset by Basic's loss.
- Marlboro's share advanced slightly versus week-ago, up +0.1 point to 35.9%.
- PM OPB's share was unchanged for the fourth consecutive week at 7.9%.
- Basic's share declined for the second consecutive week, down -0.2 points versus week-ago and -0.4 points since w/e 7/20/96 to 4.6%. Basic's share of the Discount category declined to 17.1%, its lowest level since w/e 6/15/96.
- The Discount category's share trailed week-ago by -0.1 point to 26.5%, as gains for Doral and Misty were overshadowed by declines for Basic and Liggett PL.
- Among the competitive premium products, Camel posted the only weekly share gain (+0.1) versus week-ago (of at least +0.05 points) to 6.0%. Newport and Kool incurred the largest weekly losses (-0.1 point each).

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